

ATX™ Learning Portal

Integrated Tax Research

ATX includes several research tools available inside returns. Toolbar icons, a full tax research menu and access to IRS publications allow you to find the answers you need quickly. Added integration with CCH® AnswerConnect provides even more detailed content for those who subscribe to that product.

Toolbar Icons

Three toolbar icons provide access to research tools while inside a return.

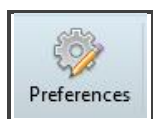


- **Tax Research:** Opens the CCH AnswerConnect homepage, where you can search for content
- **Search Online:** Opens a Google Chrome search bar inside the return for quick internet searches
- **Practice Aids:** Opens CCH AnswerConnect, displaying a list of aids for returns, including checklists, client letters and flowcharts

i To make using these tools even easier, enter your CCH AnswerConnect login credentials in **Preferences**.

To do this:

1. In **Return Manager**, click **Preferences** on the toolbar.



2. On the **Return Manager** tab, verify that your email address and password are listed in the **Tax Research Login Credentials** section.

Preferences

All Managers
Return Manager
Rollover Manager
Preparer Manager
E-file Manager
Open Return
Select Forms
Client Communication
Print
Form Display
Updates
Calculator
Backup and Files

☐ Reset to default return sorting on startup
☒ Show E-file status information for selected return
iTransact Merchant Services Client ID
CCH iFirm
Enter your iFirm website address:
https:// wktraining .cchifirm.us
Link ATX and iFirm by signing in: [\(Learn more here\)](#)

☒ Automatically send Client Portal invitation emails

Tax Research Login Credentials
User Name: maria.rangel@cchfs.com
Password:
Your ATX package includes a CCH subscription for integrated tax research.
If you don't know your login, request your [registration email](#) to get started.

[Help](#) [Reset Defaults](#) [Import Preferences](#)

CCH AnswerConnect

CCH AnswerConnect is an online research platform that includes a 360-degree view of federal and state tax laws, allowing you to compare multiple jurisdictions. This means you can view IRS publications, forms, instructions, explanations and more in one place. CCH AnswerConnect also begins showing you results before you finish entering a search term, helping you reach results faster.

To log in to CCH AnswerConnect:

1. Navigate to www.answerconnect.cch.com.
2. Type your email address and password in the fields provided, and click **Log In**.

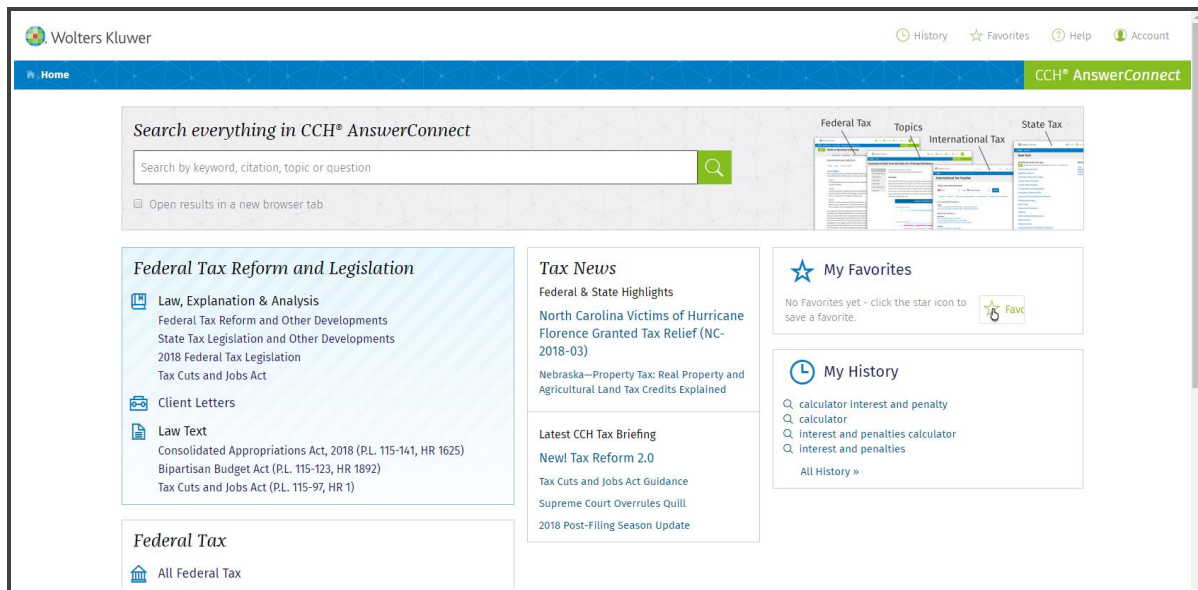
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CCH® AnswerConnect

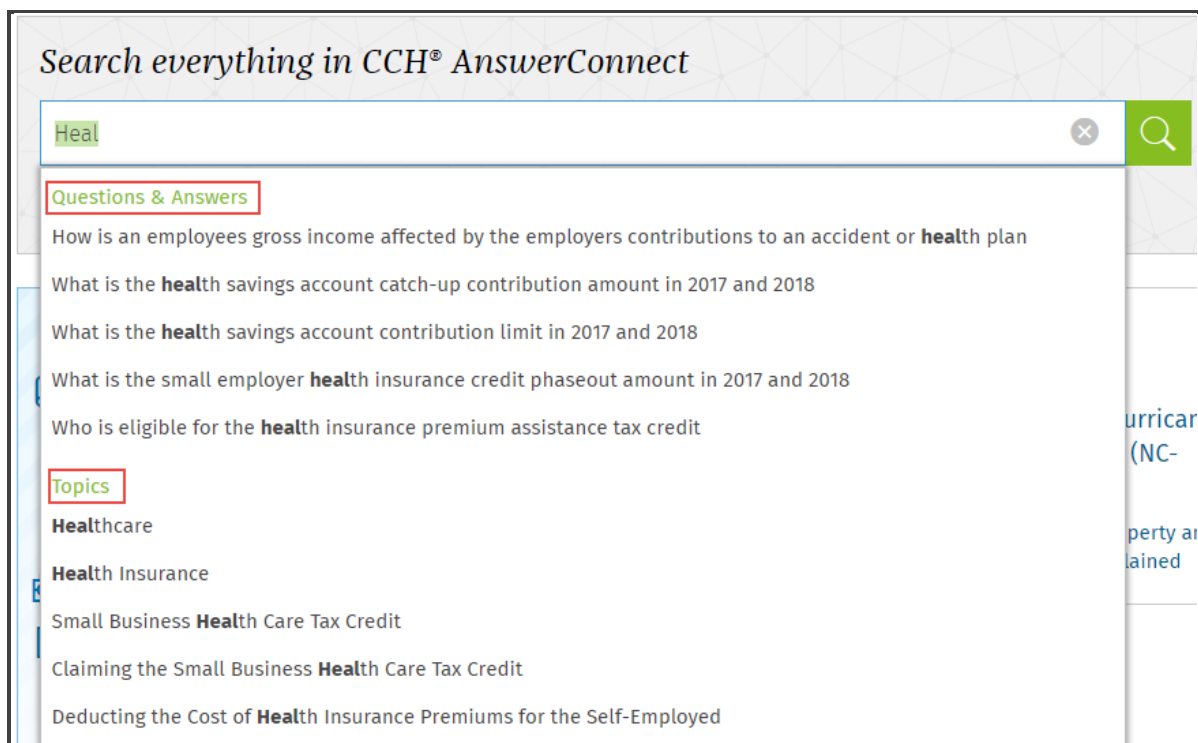
Username:
Enter your username
Password:
Enter your password
Don't save my login
Save my Username only
Save Username and Password
Forgot Password?
Log In

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Version: 3.2.1

3. CCH AnswerConnect displays the homepage.



4. Click any of the sections to view content in that jurisdiction.
5. If you begin typing a keyword in the search field, CCH AnswerConnect automatically displays a list of related topics, so you do not need to type the entire keyword. These are divided into categories to help you locate the information you need quickly.



6. Hover over any of the suggested topics to see a preview.

What is the small employer **health** insurance credit phaseout amount in 2017 and 2018

Who is eligible

Topics

Healthcare

Health Insurance

Small Business

Claiming the Small Business **Health** Care Tax Credit

The small employer health insurance credit is subject to reduction if the employer has more than 10 full-time employees or the average annual wages of full-time employees exceeds an inflation-adjusted amount. In 2017, the phaseout amount is \$26,200. In 2018, the phaseout amount is \$26,600.

See additional information [here](#).

- When you select an answer, you can easily access additional tools related to that subject from the left navigation menu.

Home » Topics » Federal » Healthcare

Health Insurance

Curated by [James Solheim, J.D., LL.M.](#)
Sr. Writer Analyst, Wolters Kluwer

Health Insurance

- Recommended Topics
- Key Primary Sources
- Client Letters
- Practice Aids
- News
- Forms & Instructions
- IRS Publications
- CPE Courses

Health Insurance

Health insurance has long been the subject of tax legislation and regulation to a wide range of requirements, especially after the “market reform.” Employer-provided health insurance is generally tax-favored, with exclusion for the self-employed. Employers have the option of paying for health insurance through a self-insuring arrangement, or they may use account-based health coverage. Health savings accounts are available to individuals, either individually or through an employer.

[Comment](#)

- You can also access Tax News from the homepage, including daily highlights and CCH Tax Briefings.

Tax News

Federal & State Highlights

[North Carolina Victims of Hurricane Florence Granted Tax Relief \(NC-2018-03\)](#)

[Nebraska—Property Tax: Real Property and Agricultural Land Tax Credits Explained](#)

Latest CCH Tax Briefing

[New! Tax Reform 2.0](#)

[Tax Cuts and Jobs Act Guidance](#)

[Supreme Court Overrules Quill](#)

[2018 Post-Filing Season Update](#)

CCH® Browser Search

If you download the CCH Browser Search plug-in, you can search in your default internet browser and still receive results from CCH AnswerConnect.

 Install the plug-in by downloading [here](#).

When you perform searches, you will see CCH AnswerConnect results along with your other results:



Tax Research Tool Tip Help

If you connect your CCH AnswerConnect tax research credentials with ATX, you can access line-specific tool tips in a return. This allows you to quickly view tax research content without needing to open the full document.

1. Verify that you have entered your credentials in Preferences.
2. To toggle the tool tips on and off, click the **Open Return** tab.
3. Select or deselect the **Display Tax Research Tool Tips** check box as needed.

Preferences


- All Managers
 - ☒ Auto-start timers in returns
- Return Manager
 - ☒ Prompt for timesheet entry on return close
- Rollover Manager
 - ☐ Use ALL CAPS for data entry
- Preparer Manager
 - ☐ Include Form 6251 in 1040 returns
- E-file Manager
 - ☒ Show Tax Due/Refund Information (Refund Meter)
- Open Return
 - ☐ Auto-Save returns after 5 minutes
- Select Forms
 - ☒ Display validation errors
- Client Communication
 - ☒ Show the form tabs on the left
- Print
 - ☒ Enable Payer Manager
- Form Display
 - Sort payers by:
 - ☐ Employer ID Number (EIN)
 - ☒ Name
- Updates
 - ☒ Display Tax Research Tool Tips
 - ☒ Automatically calculate W-2 SS and Medicare Wages
- Calculator
 - Default Check Return Filters
 - ☒ Errors
 - ☒ Warnings
 - ☒ Informational
 - ☒ Estimates
 - ☐ Overrides
 - ☒ Notes
 - ☒ E-file
- Backup and Files

[Help](#)
[Reset Defaults](#)
[Import Preferences](#)
[OK](#)
[Apply](#)
[Cancel](#)

- In an open return, you can access this tool by hovering over the blue arrow in the top left corner of various fields.

Part I Additional Income	
1	Taxable refunds, credits, or offsets of state and local income taxes
2a	Alimony received
b	Date of original divorce or separation agreement (see instructions) ▶
3	Business income or (loss). Attach Schedule C
4	Other gains or (losses). Attach Form 4797
5	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E

- ATX displays a preview of the tax help available, and you can click **Open Tax Research Content** to view the full content in CCH AnswerConnect.

1	
2a	 Tax Research CCH Tax Prep Partner (1040), 6000, State and Local Income Ta: ... State and Local Income Tax Refunds Topics Covered 6010 Introduction (Form 1040, Schedule 1, Line 10) 6020 Determining If Refund Is Taxable 6030 Figuring Taxable Amount of Refund 6040 Payer Reporting to Taxpayer 6050 Taxpayer Reporting on Return 6090 Practice Aids and Tools ... Introduction (Form 1040, Schedule 1, Line 10) A taxpayer generally must include a refund of p... View additional Tax Research content on this topic... Open Tax Research Content
3	
4	
5	
6	
7	

Tax Research Menu

A full tax research menu provides access to the same tools as the toolbar icons, as well as many other specific types of research.

